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Product Brief

Non-Alcoholic Beverages

2005

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Report Highlights:

The Korean non-alcoholic beverage market is estimated at \$3.8 billion in 2005, a growth of five percent from the previous year. Functional beverages are responsible for much of the growth, while sales of carbonated beverages have declined. The juice market is expected to increase given the rising interest in health, however local manufacturers are more interested in importing raw ingredients than finished products. The total value of imported non-alcoholic beverages, including juices (both finished product and raw ingredients), bases for sodas and mineral water was \$62 million in 2004.

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Section 1. Market overview

The total size of the non-alcoholic beverage market in Korea in 2005 is estimated at \$3.8 billion, a growth of five percent from the previous year.

Functional beverages, such as Aloe Morning, Pine Bud beverage and Vitamin 500 are responsible for much of the growth, while sales of carbonated beverages have slowed considerably. However, the variety of functional beverages is currently limited, therefore most beverage companies are concentrating their marketing strategies on such things as container design and promotional activities. The juice market is expected to increase given the rising interest in health. Concerns about environmental pollution and safe drinking water have also triggered more interest in mineral water.

Table 1: The Sales Of Non-Alcoholic Beverage

Unit: \$Million

	2003	2004	Percent Change
Fruit and Vegetable Juice	983	1,013	3.1%
Carbonated Beverages	1,118	1,162	3.9%
Mineral Water	253	302	19.4%
Sports Beverages	201	210	4.5%
Canned Coffee	307	318	3.6%
Functional Beverages	253	302	19.4%
Traditional Korean Drinks	90	78	-13.3%
Flavored Water (Near Water)	129	140	8.5%
TOTAL	3,334	3,525	5.7%

Source: Food Distribution Annual 2005 by Food Journal

Table 2: Advantages and Challenges for United States

Advantages	Challenges
In general, the United States has a good reputation for high quality beverage products.	Korean consumers are more likely to purchase well-known or domestic brands.
Local companies are always looking for new products to boost their market share.	Distribution tends to be tied to a manufacturing company.
Tariffs of mineral water, extracts and essences at 8 percent are reasonable.	High tariffs for fruit and vegetable juices. The average tariff is 46.6 percent.
Consumers feel premium products have a higher quality and are more trust worthy; they're willing to pay more for these products.	Inspection procedures can be troublesome and are stricter than in the United States.
Imports of beverage products are likely to be on a large scale.	
The large size of the beverage market affords greater opportunities for U.S. exporters.	Competition from Korean manufactured products is likely to be strong.

The total value of imported non-alcoholic beverages, including juices both finished product and base materials and mineral water was \$62 million in 2004. This represents 16 percent of the total market. However, ninety nine percent of this amount was concentrate for bottling in Korea. The value of finished product imported into Korea was probably only around one percent.

Section 2. MARKET SECTOR OPPORTUNITIES AND THREATS

Ninety percent of all beverage products are sold through the retail and wholesale market, nine percent through the foodservice sector and one percent for food processing.

1. Entry Strategy

The current best strategy to enter the non-alcoholic beverage sector with a new-to-market product is to contact and work with an established importer as few retailers import directly. However, because three companies, Lotte Chilsung Beverage, Haitai Beverage and Coca-Cola currently account for over 50 percent of all non-alcoholic beverage product sales and maintain competitive facilities with advanced technology; meeting with these companies is recommended.

In addition, Korean beverage companies would prefer to manufacture a domestic product with imported raw materials rather than to import a finished beverage product, which will entail paying tariffs and transportation charges.

- Established importers should be able to provide market intelligence, up-to date information, guidance on business practices and trade related regulations, sales contacts with existing and potential buyers, and market development expertise.
- The type of contract between the importer and exporter varies from joint investment partnership to exclusive agent-ship to non-binding broker-ship mainly depending on how the exporter sees the role of the importer in market development. The most common practice is maintaining a non-binding seller-buyer relationship during the test-market period and then upgrading to a more binding option if the market shows bigger potential.
- There are many things that the U.S. exporter should follow closely with the importer during the initial stage of export. The Korean government maintains very strict regulations on imports and requires various certificates/documents and product information before approving import of a new-to-market food product. Therefore, the exporter must provide the importer with necessary documents and information to submit to the government. More detailed regulatory information on food safety and labeling can be found in FAS report, #KS5037, (www.fas.usda.gov).
- Protecting the company/product trademark and patents is an important issue in Korea and can be easily handled by working with local attorneys.

2. Market Size, Structure, Trends

a. Fruit and Vegetable Juices:

As a result of steady R&D investment and choosy consumers, the Korean fruit juice industry produces a wide variety of high quality products that are recognized the world over. Juice product lines include apricot, pineapple, pear, mango, guava, and pomegranate as well as orange, grape and apple. An effort is made by manufacturers to diversify products by packaging, capacity and variety.

Table 3: The Sales of Fruit and Vegetable Juices by Percentage of Concentrate
Unit: \$Million

	2003	2004	Percent Change
100% Juice	363	349	-3.9%
50% Juice	158	201	27.2%
Thin Juice And Puree	407	407	--
Other ¹	55	56	1.8%
Total	983	1,013	3.1%

Source: Food Distribution Annual 2005 by Food Journal

Table 4. Imports of Fruit and Vegetable Juice from the United States
Unit: \$Thousand

Description	2000	2001	2002	2003	2004	2005 ²	2004 Market Share
Orange Juice	1,655	1,355	15,413	15,575	12,003	9,588	26%
Grapefruit Juice	N/A	N/A	608	347	606	506	30%
Other Citrus Fruit Juice	N/A	N/A	683	527	710	512	72%
Pineapple Juice	N/A	N/A	203	165	190	286	11.5%
Tomato Juice	194	195	203	196	246	292	96%
Grape Juice	N/A	N/A	12,552	9,797	9,899	10,628	50%
Apple Juice	N/A	N/A	101	188	343	624	18%
Other fruit or vegetable Juice	1,868	2,876	4,139	5,342	5,290	5,740	29%
Juice Mixtures	1,655	1,355	2,099	6,984	2,639	4,432	44.5%
Total	5,372	5,781	36,001	39,121	31,926	32,608	

Source: Korea International Trade Association

Since 1997, the Korean juice industry has benefited from advanced cold storage distribution technologies, which allows them to deliver very fresh juice to retail outlets. One popular method of distribution is to pack the fruit juice in cold temperatures like milk and distribute them with cars equipped with a cold storage system. The package is made of special materials that significantly reduced exposure to air and ultraviolet rays, which helps to maintain the cold temperatures. This cold storage method produces high quality fruit juice that has the taste of fresh squeezed juice. This method received much acclaim from

¹ Powdered Mixes, canned juice (not frozen), or jelly drinks

² Estimate

consumers, resulting in a 20 percent increase in sales in 2001 and a 30 percent increase in 2002.

In Korea, Two major companies have monopolized the Korean fruit juice market, Lotte Chilsung Beverage Company (currently with a fifty percent market share) and Haitai Beverage Company (forty seven percent market share). In 1975, Haitai Beverage Company introduced Haitai juice products in Korea. Four years later, Lotte Chilsung Beverage Company built a juice factory with modern facilities. The strong rivalry between the two companies began in earnest when they entered into joint ventures with popular American juice brands (Sunkist with Haitai, Delmont with Lotte) in 1980.

Orange juice is the leading product in the fruit juice category. Orange concentrates are imported mainly from Brazil and Florida. However, because of recent hurricane damage in the United States, Brazilian oranges are now more prices competitive. The difference in quality is negligible. Most Korean companies import frozen concentrates or concentrates in aseptic packaging (carried under minus ten degrees) and manufacture the beverage locally.

Table 5. Frozen Orange Concentrates Imports: Jan-May in 2005
Unit: Dollars

	Quantity (Kg)	Value	Value/Kg	Market Share
Brazil	12,789,281	13,238,308	1.04	77.5%
USA	3,507,434	4,303,967	1.23	21.3%
Canada	13,225	26,242	1.98	0.08%
Israel	9,275	12,799	1.37	0.05%
Italy	250	2,074	8.29	0.001%
Netherlands	182,498	195,117	1.06	1.1%
Total	16,501,963	17,778,507		

Source: Korea Customs Service

In March of 2005, the Coca-Cola Korea Bottling Company was able to successfully penetrate the orange juice market with its Minute Maid brand as a result of its improved packaging and superior taste. The orange concentrate for this product is imported from Turkey, however, the good reputation that American products enjoy played an important role in gaining market share for this product in Korea.

b. Carbonates:

In the mid 1990's, the carbonated beverage market expanded to include many diverse brands in order to compete in the global market place. As a result, the 1997 Asian Financial Crisis did not have much effect on this industry. Since 2000 however, retail consolidation, links between production and sales, and Internet marketing activities has accelerated competition in this field; and combined with health concerns have resulted in decreased sales.

Table 6: The Sales Of Carbonates
Unit: \$Million

	2003	2004	Percent Change
Uncaramelized Soda (e.g. SPRITE)	315	347	10.2%
Caramelized Soda (e.g. COKE)	507	505	-0.4%
Flavored Soda (e.g. FANTA)	38	244	2.5%
Other ³	58	66	13.8%
Total	1,118	1,162	3.9%

Source: Food Distribution Annual 2005 by Food Journal

Table 7: Imports of Carbonates Beverage from USA
Unit: \$Thousand

Description		2000	2001	2002	2003	2004	2005 ⁴	2004 Market Share
Mineral Water, Flavored ⁵	Colored	2,135	2,240	3,614	10,922	10,506	17,475	97%
	Other	N/A	138	156	149	330	650	26%
Total		2,135	2,378	3,770	11,071	10,836	18,125	90%

Source: Korea International Trade Association

Other flavored sodas, such as dairy based sodas, have seen strong demand from consumers. In 2004, the sales of carbonated beverages actually increased by three percent despite Coke's downward tendency. New flavors continue to create excitement. The introduction of new flavors has been a major marketing strategy in Korea. The well-being trend and concerns about obesity, consumption of low or no calories has steadily increased and shows no signs of abating. In addition, consumers' desire for new products is very strong.

c. Mineral Water:

South Korea's bottled water market is booming despite overall sluggishness in the country's beverage sector. While consumers in Japan, Europe and the United States are used to purchasing bottled water, Korean consumers haven't always been interested, even though inexpensive products were available. However, concerns over excessive sugar intake and related health problems, such as diabetes and obesity, has changed people's ideas about bottled water and resulted in a steady sales growth. In addition, consumer confidence in the municipal water supply is not as strong as it once was.

The mineral water business was legalized in 1995 in Korea and every year since then has seen an expansion in sales. The country's bottled water market, which expanded to about \$300 million last year, is expected to rise another 20 billion won in value by the end of the year. The Korea Mineral Water Association (KNMWA) expects the market to double the

³ Dairy based, or barley

⁴ Estimate

⁵ Water, including mineral water and aerated water, containing added sugar or other sweetening matter or flavored, and other non-alcoholic beverages

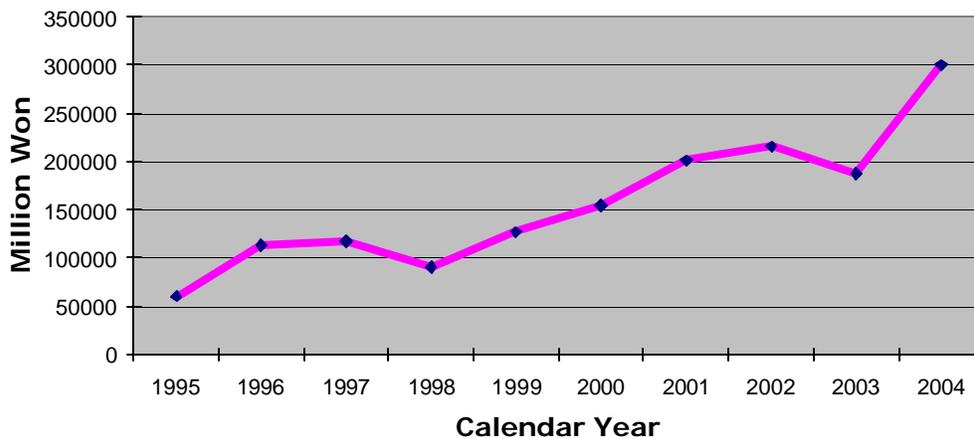
current level by 2010.

Four main domestic companies have captured the bulk of the market although there are several other manufacturers. The key players are Nongshim, Jinro, Dongwon F&B and Lotte Chilsung Beverage. In 2004, Nongshim held the biggest share of the market with 19 percent, followed by Jinro with 16 percent. Dongwon F&B ranked third with a 13 percent share and Lotte Chilsung accounted for six percent.

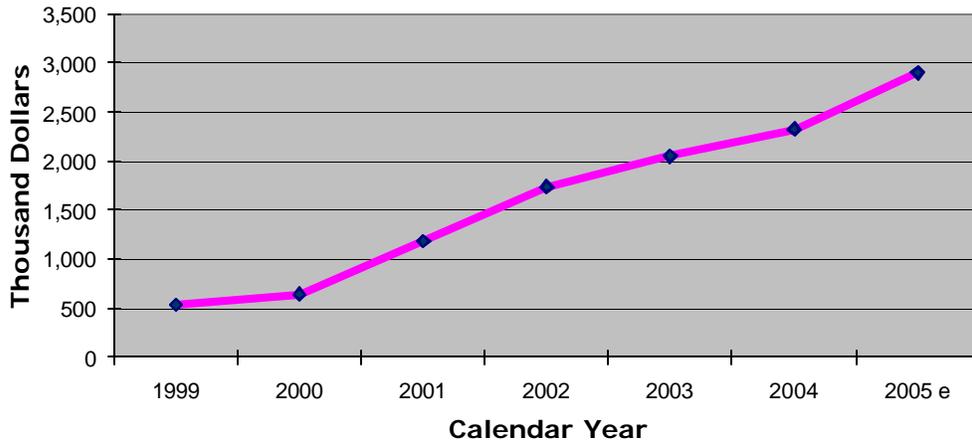
Foreign companies are rapidly expanding the market. Evian, a leading global brand in the mineral water business, has advanced into the South Korean water market through cooperation with Lotte Chilsung. Evian has joined up with the Korean company and its nationwide sale network to raise its market share from the current one percent. Evian will target customers at spas and gymnasiums, where highly health-conscious people gather. It will launch a so-called star marketing strategy, promoting products with popular sports stars and entertainers

Another global leading food company linked up with the Korean company Pulmuone in January. Nestle and Pulmuone's mineral water business affiliate Pulmuonesammul signed a contract to establish a joint venture. The new company will use the name of the Korean firm and Nestle will control 51 percent. They plan to develop new brands and products, and retail them via the sales network of the Korean company.

Domestic Sales of Mineral Water



Total Imports of Mineral Water



Source: Korea Natural Mineral Water Association

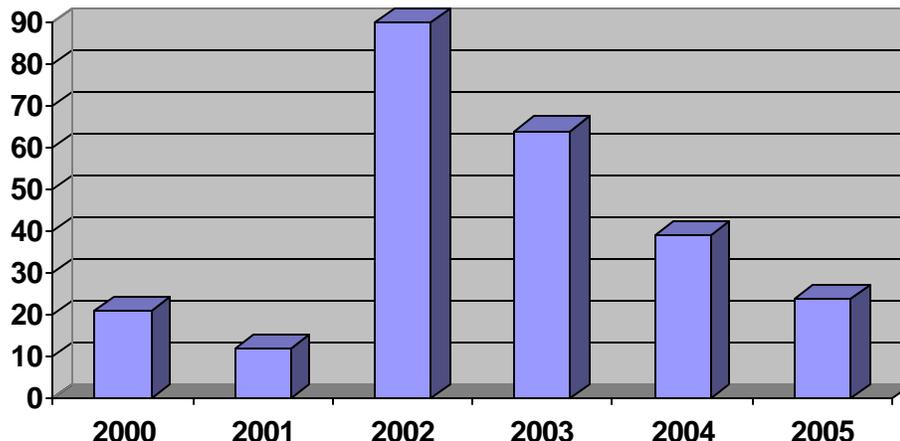
Table 8. Mineral Water: The sales of the first half year 2005
Unit: \$Million

Manufacturer	Brand	Sales	Percent Change (Y-to-Y)	Market Share
Nongshim	Jeju Samdasu	33	10.0%	19%
Dongwon F&B	Dongwon Saemmul	25	20.0%	13%
Lotte Chilsung	ICIS	22	22.2%	6%
Jinro	Jinro Seoksu	20	10.0%	16%

Source: Internet Food News Briefing and ATO Industry Sources

In June 29, 2005 it was reported that Uleung Mineral Company discovered deep-sea water which people can drink with abundance of mineral, nutrients, nearby Uleung Island in Korea. The representative of this company expects that this sale volume of deep-sea water would reach at \$ 1000 millions by 2010.

Imports of Mineral Natural Water from USA
Unit: \$Thousand



In 2004, market share of United States in Korea was only about two percent.

d. Sports Beverage:

In 1999, the sports beverage market was approximately valued at \$190 million; however sales in the following year decreased by ten percent due to the lack of demand. In 2001, Cheil-Jedang (or CJ) took over as the marketing organization for Gatorade from Lotte Chilsung Beverage Company. CJ was able to somewhat reverse this declining trend and in 2002, there was a dramatic increase in the sales of sports beverages by twenty percent. The 2002 World Cup games being held in Korea likely contributed to their success. In 2004, sales were \$210 million. Industry analysts expect the market for sports beverages will remain stable for the next several years.

The majority of consumers for sports beverages are the youth generation (15-23 years old). They are early adopters. They want to be differentiated from other age groups, so they quickly absorb new trends and fashions, have relatively low brand loyalty and are interested in sub brands that specifically target them. Therefore, product diversification and marketing will be important to capture the attention of this generation.

e. Canned Coffee:

In 1985, the Dongsuh Foods Company introduced canned coffee to the Korean market. Canned coffee is premade and premixed with sugar and cream. It is often sold through vending machines, which has been a popular means of selling coffee. Koreans mostly drink instant coffee and don't have the capability of making fresh coffee at home.

In 1991, several international brands, such as Maxwell House, Letsbe, and Nescafe, have been introduced. From 1997, Letsbe, produced by Lotte Chilsung Beverage Company, has been the brand leader with fifty percent of market share in the canned coffee market.

The canned coffee market has become very diversified in recent years including a variety of flavors, quality and packaging. Korea does not grow coffee; all products are imported as instant or extracts. Korea mainly imports coffee from Vietnam, Honduras, Columbia and

Brazil. For premium-canned coffee, Korea imports coffee beans and manufactures the products locally.

f. Near Water:

In Korea, near water is the term used when fruit juice and aroma have been added to pure water.

In April of 1999, Namyang Dairy Product Co., Ltd put 'Near Water' flavored with three percent fruit concentrate on a debut. Lotte Chilsung Beverage Company marketed 'Refreshing Water 2%' and Haitai Beverage Company launched 'Dream of water', all of which started a wave of these types of products in the market. 'Refreshing Water 2%' is the main brand in the near water market with over ninety percent market share. There are two-product lines for 'Refreshing Water 2%', peach flavored and grape flavored. The peach concentrate comes from California and the grape concentrate is imported from Spain.

Near water products are very popular for consumers interested in something more than plain water. Consumption of these types of beverages is high. Consumers are always looking for something new, which provides an excellent opportunity for imported products. Even now the market share of 'Refreshing water 2%' is dropping as consumers switch to new products.

g. Others:

Korean Traditional Drinks:

Korean Traditional Drinks: Traditional Korean drinks include a sweet fermented rice drink called "Shikkye", a date drink, a fruit punch made with honey, dried persimmons, pine nuts and cinnamon, and a grain drink. In 1993, the Birak Company was instrumental in making this drink popular. However, most traditional drinks do not last long. In 2004, sales of traditional drinks were valued at \$100 million.

Functional Beverages: Since the 1990's, functional supplements have been added to beverages, including fibers, collagen, onion, pine needles, Kitosan, Aloe, vitamins and so on. A 'collagen beverage' product produced by Lotte Chilsung Beverage Company launched in 2005 received a lot of interest from consumers. The collagen ingredients are pork skins and fish bones among other things. These ingredients are currently being imported from Japan. Drinks with aloe puree, imported from the United States, are also very popular.

With health concerns at the forefront, the functional drink industry is growing. The sales of functional drinks reached \$110 million in 2001, \$130 million in 2002 and \$160 million in 2004. This market is characterized by a fast changing product life cycle.

3. Company Profiles:

The following table lists the major beverage companies in Korea. U.S. exporters interested in a more specific list of companies can contact that Agricultural Trade Office directly.

Table 9: Major Korean Beverage Companies by Sales Volume: 2003
Unit: \$Million

Ranking	Enterprises	Sales	Market Share
1	Lotte Chilsung Beverage Co.,Ltd	806	25%
2	Coca-Cola Korea Bottling Co.,Ltd	439	14%
3	Haitai Beverage Co.,Ltd	369	12%
4	Donga-Otsuka Co.,Ltd	171	5%
5	Woongjin Foods Co.,Ltd	129	4%
6	Coca-Cola Korea Co.,Ltd	87	3%
7	Maeil Dairy Industry Co.,Ltd	86	2.68%
8	Chung's Food Co.,Ltd	85	2.66%
9	Sahmyook Foods	48	1.5%
10	Korea Yakult Co.,Ltd	39	1%

Source: Food Distribution Annual 2005 by Food Journal

Section 3. Costs and Prices

The following table details retail prices for the major types of non-alcoholic beverages. These prices were obtained from a nearby convenience store.

Table 10. Current Prices of Non-Alcoholic Beverages in Convenience Store in Korea: 2005
(\$1 US Dollar = 1,042.80 Korea Won)

Non-Alcoholic Drinks	Brand	Manufacturer	Amount	Price	Raw Materials Imported
Carbonates	Chilsung Cider	Lotte Chilsung	250mL	450 won	
	Coke-Cola	Coca-Cola Korea Bottling	250mL	300 won	
Juices Based on Fruits and Vegetables	Cold Orange	Lotte Chilsung	240mL	750 won	Orange Concentrates 59% from Brazil, 41% from United States
	Cold Grape	Lotte Chilsung	240mL	750 won	Grape Concentrates 86.6% from Spain, 11.16% from United States, 2.23% from Italy
	Cold Tomato	Lotte Chilsung	240mL	750 won	Tomato Paste from China

	Minute-Maid	Coca-Cola Korea Bottling	350mL	1,500won	Orange Concentrates 100% from Brazil
Natural, Mineral Water	Wiselect	Lotte Chilsung	500mL	300 won	
	Soonsoo 100	Coca-Cola Korea Bottling	500mL	350 won	
	Evian	Lotte Chilsung	500mL	900 won	End product from France
	Volvic	Lotte Chilsung	500mL	900 won	End product from France
Sports Beverages	Gatorade	Lotte Chilsung	250mL	700 won	
	Pocari Sweat	Donga-Otsuka Co.,Ltd	250mL	750 won	
Ready To Drink Coffee	Maxwell House	Dongsuh Foods	175mL	500 won	Coffee bean imported from Vietnam, Honduras, Columbia and Brazil
	Nescafe	Nestle Korea	175mL	500 won	
	Letsbe	Lotte Chilsung	175mL	300 won	
	Aloe Morning	Haitai	180mL	450 won	Aloe 12% from United States, 8% from Thailand
	Janchigib Rice punch	Lotte	238mL	520 won	
	Vitamin 500	Kwangdong Pharm	100mL	500 won	
	Fiber mini	Donga-Otsuka	100mL	500 won	
	Pine bud Beverage	Lotte Chilsung	240mL	600 won	Pine bud Concentrates 50% from Switzerland
Near Water	Refreshing water 2%	Lotte Chilsung	240mL	450 won	Peach imported from United States

Source: Survey in Lotte Department Store by ATO Seoul

Table 11. TARIFFS

HS Code	Description	Tariff
2009100000	Orange Juice	50%
2009200000	Grapefruit juice	50%
2009300000	Juice of any other single citrus fruit	50%
2009400000	Pineapple juice	50%
2009500000	Tomato juice	30%
2009600000	Grape juice (including grape must)	45%
2009700000	Apple juice	45%
2009800000	Juice of any other single fruit or vegetable	50%
2009900000	Mixtures of juices	50%
2101100000	Extracts, essences and concentrates, of	8%

	coffee	
2201000000	Mineral Waters ⁶	8%
2202000000	Mineral Waters, Flavored ⁷	8%
2202902000	Beverage of fruit juice	26.2%

Source: Tariff Schedules of Korea 2005 by Korea Customs & Trade Institute

Korea Custom Service charges a tariff on raw materials rather than on the form of imports.

Section 4. Market Access

Modern retail outlets, such as hypermarkets, convenience stores and online supermarkets are revolutionizing distribution channels. Currently, the greater buying power of the beverage distribution industry is controlling the market as half of all sales still come from traditional outlets, such as wet markets and mom and pop stores. Heavy competition has meant fewer profits. However, as more products are sold through modern retail outlets, the manufacturing industry is able to deal directly with the retail industry, eliminating the distributor and additional mark ups.

Labeling Requirements:

Imported beverages are required by law to have a Korean language label. Korean language stickers may be applied in lieu of a Korean language label. The sticker should not be easily removable and shouldn't cover the original labeling. The principal display panel must contain the product name, product type and content information. If this is not feasible, such information shall be provided in a Korean language sticker using a 12-point or larger font pitch size. The Korean language label should contain the following information.

1. Product Name: The product name should be identical to the product name declared to the licensing/inspection authority.
2. Product type: This is mandatory for specially designated products, such as non-alcoholic beverages.
3. Manufacturing company of origin and address.
4. Manufactured date-month, and year: This is not mandatory for beverages since it is required to have the shelf life (expiration date) listed on the label.
5. Importer's name and address, and the address where products may be returned or exchanged in the event of defects.
6. Importers' business license number
7. Seller's name, address and phone number
8. Shelf life
9. Weight of product.
10. Ingredient(s) or raw material(s) and a percent content of the ingredient(s): The name of the major ingredient must be included on the label as well as the names of at least the next four principle ingredients. These should be listed with the highest percentage first followed by the others. Artificially added purified water doesn't count as one of the five major ingredients.

⁶ Waters, including natural or artificial mineral waters and aerated waters, not containing added sugar or other sweetening matter nor flavored

⁷ Water, including mineral water and aerated water, containing added sugar or other sweetening matter or flavored, and other non-alcoholic beverages

11. Nutrients: Only special nutritional foods, health supplementary foods, products wishing to carry nutritional labels and products wishing to carry a nutrients emphasis mark are subject to nutritional labeling.
12. Other items designated by the detailed labeling standards for food et al.: This includes cautions and standards for use or preservation (e.g., drained weight for canned products, radiation-processed products, etc)
13. Country of origin labeling is required on food products.
14. Packaging material

Shelf Life of bottled drinking water

In Korea, the shelf life of bottled drinking water should be within six months from the date of manufacturing in accordance with "Notice of Standards and Specification for Drinking Water and its Labeling Standards".

However, importers of drinking water can file a request with the Ministry of Environment (MOE) for the extension of shelf life of bottled water, whose shelf life is approaching. The request should be made before the six-month shelf life expires. Even for products that have been detained at port due to a short shelf life, importers can request the extension. If the extension is granted, then importers will be able to clear the products from customs.

Importers can contact the division below for details. There are several documents and samples that importers are required to submit to MOE for review. Once the importer submits these documents and samples to MOE, MOE will have the National Environment Institute test the samples to see if they are in compliance with Korean standards and specifications.

Documents include:

1. A test certificate issued by an accredited inspection organization
2. A document that provides a manufacturing date of products
3. A document verifying that products have been completed sealed
4. Manufacturing process
5. A document that provides a storage condition of products
6. A copy of drinking water import and sales business permit
7. Five liter of sample water

Soil and Groundwater Management Division
Ministry of Environment

Phone: +82-2-2110-6765 or 6769

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Section 5. KEY CONTACTS and FURTHER INFORMATION

U.S. Agricultural Trade Office

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Telephone: (011-82-2) 397-4188

Fax: (011 82-2) 720-7921

E-mail: atoseoul@usda.gov

Website: www.atoseoul.com

Appendix

Table 12: Imports for Bases of Non-Alcoholic Beverages from USA
Unit: \$Thousand

Description	2000	2001	2002	2003	2004	2005 ⁸	2004 Market Share
Bases for Nonalcoholic Beverages	780	976	651	955	979	872	6.13%

Source: Korea Trade Statistics by Korea International Trade Association

⁸ Estimate